SP☼TLIGHT

Next Release of ePMA Set for Summer 2006

The next release of ePMA, Release 4, is scheduled for deployment in late July or early August, and will incorporate many user-friendly Software Change Requests (SCRs) submitted by Site Administration Managers.

Of the 46 SCRs the Joint Change Control Board reviewed on April 16, 29 were approved, and eight were deemed important enough to be incorporated into the current release of ePMA, including changing the Actual Milestone Date default setting and adding new contractor organization codes.

Other approved SCRs which have been incorporated into the current release include the following:

- **Task Complete Operation on Multiple Proposals (for Site Office and HQ) -** When a team is set up for multiple proposals, Site Office and HQ Administrators now have the ability to perform a Task Complete operation on multiple proposals on their task list, allowing proposals to advance into the workflow en mass.

- **Expandable Team Setup Popup Window** - The popup window for team setup of multiple proposals can now be expanded, eliminating the need to scroll down.

The following is a sample, broken down by functionality area, of SCRs which the JCCB approved for incorporation into the next release:

E-mail
- The proposal number will appear on all notification e-mails.
- Everyone in the workflow will receive an e-mail notification when they need to act on a proposal on their task list.
- Individuals and organizations will be added to Accepted, Approved, and Declined e-mail notifications.

Search
- Users will be able to search for proposals by Program Manager, PI, and B&R Code in the repositories.

Task List
- An Internal Lab Number field will be added to the list of available fields for customizing the task list and recent tasks. (Currently, users can create custom views of the task list and recent tasks, utilizing 19 different fields. Additionally, these lists can be grouped and/or sorted using the selected fields.)
  continued

Workflow
- National Laboratories must assign a minimal B&R Code to proposals before ePMA will forward the proposals to the next step in the workflow. This will save time because Site Offices will not have to return proposals to the laboratories to have B&R Codes added.

Lab Reports
- To ensure that all of a laboratory's proposals are in ePMA, National Laboratories will be able to cross-reference their list with the proposals in ePMA, along with some other key fields, such as PI, name of attachment, and proposal status.

Other
- External comments will be printed when a proposal is printed.
- The Short Proposal Title will be lengthened from 20 characters to 30 characters.

Please see http://epma.energy.gov/scr/scrstatus.asp for details on the status of all submitted SCRs. ePMA users are our best source for suggestions to increase its efficiency, so the ePMA Project Team says, ***Thank you!*** to users who took the time to suggest improvements.

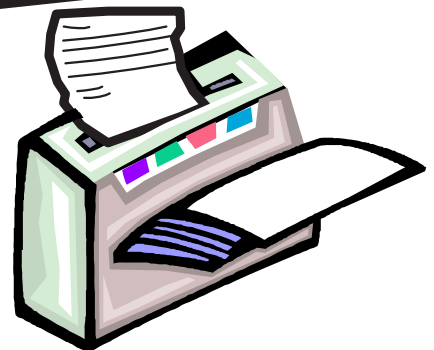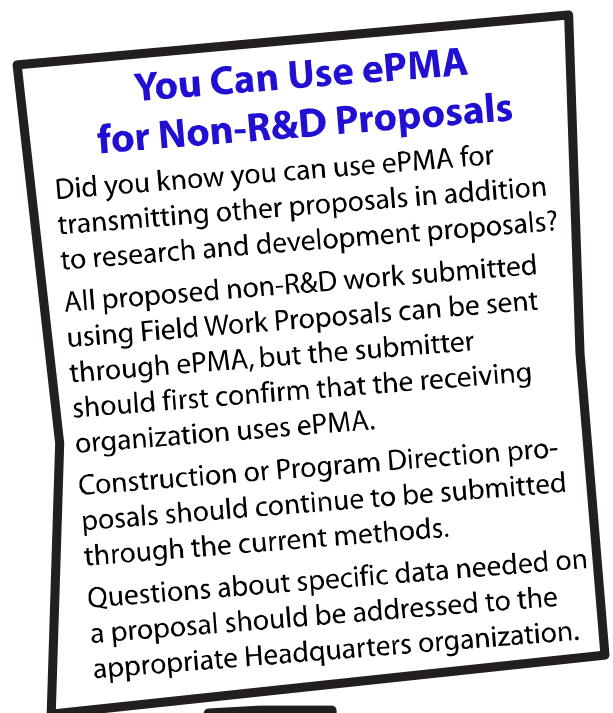## ePMA Welcomes Two New User Organizations

ePMA is delighted to welcome two new Office of Science user organizations, SC-27, the Workforce Development for Teachers and Scientists Program, and SC-33, the Office of Information Technology Management. Welcome, Brian O'Donnell, Site Administration Manager for SC-27, and Krystal Harne, SAM for SC-33.

The Workforce Development for Teachers and Scientists Program continues the Department's long-standing role of training young scientists, engineers and technicians in the scientifically and technically advanced environment of DOE's National Laboratories. SC-27 staff oversees fellowships for distinguished science, technology, engineering, and mathematics educators.

SC-27 also organizes the DOE National Science Bowl, an academic competition among teams of high school students who attend science and technology seminars and compete in a verbal forum to solve technical problems and answer questions in all branches of science and math. The Middle School Science Bowl, another SC-27 event, emphasizes discovery and hands-on activities such as designing, building, and racing model solar cars.

The Office of Information Technology Management is responsible for the Office of Science's cyber security, information technology services, information planning and development, and activities of the Office of Scientific and Technical Information (OSTI). *continued*

You Can Use ePMA for Non-R&D Proposals

Did you know you can use ePMA for transmitting other proposals in addition to research and development proposals?

All proposed non-R&D work submitted using Field Work Proposals can be sent through ePMA, but the submitter should first confirm that the receiving organization uses ePMA.

Construction or Program Direction proposals should continue to be submitted through the current methods.

Questions about specific data needed on a proposal should be addressed to the appropriate Headquarters organization.
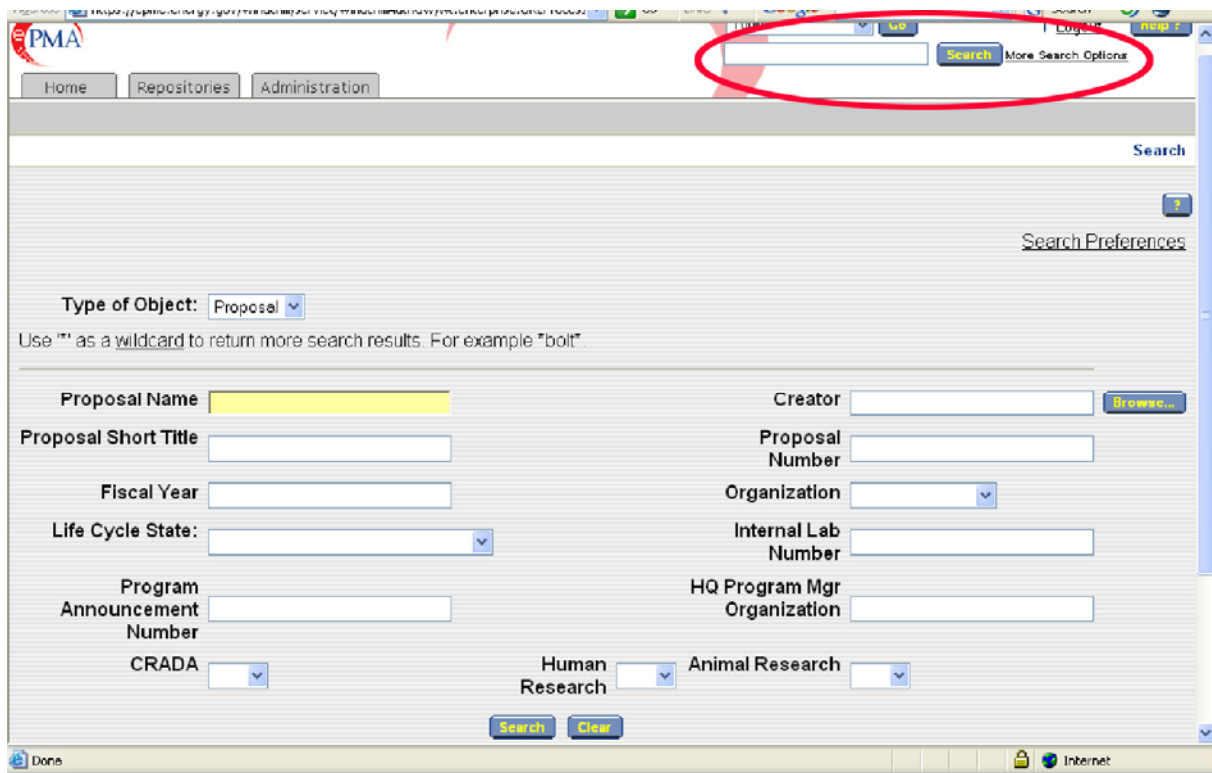
SC-33 administers and executes budgets for OSTI and ePMA, and supports other SC corporate initiatives, including Integrated Office Automation, Networking, and Telecommunications. SC-33's IT Services Division:

- Provides helpdesk and desk-side support.
- Retired unsupported portal technology, placing extensive collaboration resources in the hands of the SC community.
- Provides a 99.99% application, e-mail, remote access and network services availability.

User Tip
More Search Options Screen Increases Efficiency

Many users are going to the repository to search when it is more efficient to search using the More Search Options screen. The link may be found at the top of all screens (circled in example). Clicking on this link will bring up the example screen below:

The following fields are the best ones to use for searches:

- Proposal Name – examples of proposal names are 2345BUDG or 7891FUND
- Proposal Short Title – this is the information in the Proposal Short Title field at the top of the Admin tab
- Fiscal Year – 4 digit FY, i.e. 2008 or 2006
- Organization – this is the **sending** organization. Examples: ORNL, PNNL, LLNL
- HQ Program Manager Organization – this is the receiving organization. Examples: SC22, SC23
- Life Cycle State – state or status of the proposal. Basic examples for organizations are: Lab – Draft in Progress, Site Office – SO Pending Waiting to Process, HQ – HQ Pending Waiting to Process. There are other specialized states that can be selected, too.
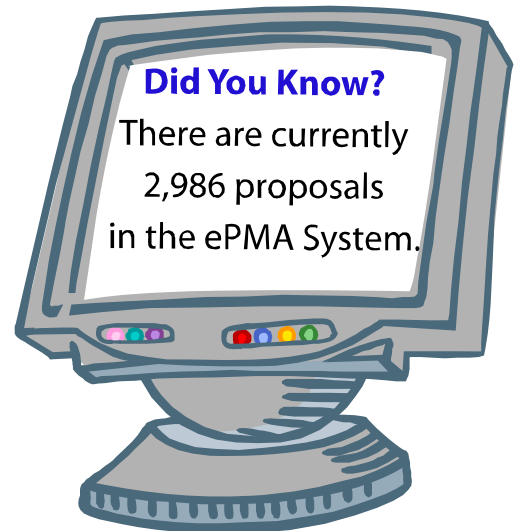 *continued*

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The wildcard character, *, should be used in all searches using Proposal Name, Proposal Short Title, and HQ Program Manager Organization. Using the wildcard after the input tells the application to return anything that begins with that input regardless of what follows it. Wildcard at the beginning says anything before and then the input. Examples are:

- Proposal Name123* - returns 123FUND, 1234BUDG but would not return 6123FUND
- Proposal Name *123* – returns 123FUND, 1234BUDG and 6123FUND
- Proposal Short Title - *nuclear* - returns any short title with the word nuclear in it
- Organization – ORNL – returns all ORNL proposals
- HQ Program Manager Organization – SC23* - returns all SC23 proposals, regardless of division
- HQ Program Manager Organization – SC23.2* - returns all SC23.2 proposals but would not return proposals sent to SC23 (SC23 is what is designated in the field on the Admin tab)
- HQ Program Manager Organization – SC23.* - returns proposals for SC23.1, SC23.2, SC23.3, and SC23.4. Would not return proposals sent to SC23 (SC23 is what is designated in the field on the Admin tab.)

All searches are "and" searches. This means that a proposal must meet all the parameters input into the search screen. Search parameter examples:

Did You Know?
There are currently 2,986 proposals in the ePMA System.

- Organization: ORNL
- HQ Program Manager Organization: SC*
- Fiscal Year: 2008
- Proposal Name: *budg*
  - o Returns: all budget call proposals sent from ORNL to the Office of Science for 2008
- Organization: LLNL
- HQ Program Manager Organization: SC23*
  - o Returns: all proposals sent from LLNL to the Office of Biological and Environmental Science (OBER)

From the Project Manager

Thanks to our users, ePMA is approaching more decisive milestones. We have almost 3,000 proposals in the system – 2,986 at presstime. We are making the last major software change requests for ePMA. And, the deployment in late July/early August of Release 4 will probably be the last major release of the application, as we envision then becoming steady state, except for necessary revisions and upgrades. So, this is a perfect opportunity for me to express my thanks, and that of the ePMA Project Team, to ePMA's Site Administration Managers and system users for their continuing support and use of ePMA. A special thanks to the SAMs who have recommended improvements to the application through the submittal of SCRs. As we forge ahead, the ePMA team still invites your comments and suggestions, because we plan on ePMA being your proposal processing application for the foreseeable future, and we are striving to meet your needs. **Thanks again** to all who have helped us achieve our goals and milestones. ~Vince Dattoria

DOE Chief Information Officer Presents
Award to ePMA Project Team

The Department of Energy's Chief Information Officer, Thomas Pyke, Jr., presented the ePMA Project Team with a Technical Excellence Award at DOE's 2006 Annual Information Management Conference (AIMC) in Austin, Texas, in March.

Vince Dattoria, ePMA Project Manager, received the award on behalf of ePMA. Project Team members received a Certificate of Appreciation, signed by Pyke, "For developing and deploying the first and only uniform application for the electronic submission of R&D proposals, used by every major National Laboratory in the DOE complex."

Each year, an AIMC award selection committee chooses groups or individuals in the categories of Executive Leadership, Technical Excellence, Management/Administrative Excellence, and Student/Intern for awards to recognize the positive contribution their work has made to the mission of the Department of Energy.

The ePMA Project Team would like to thank Carol Ingram, former Site Administration Manager at the Berkeley Site Office, for nominating ePMA for the award. In her nomination, Carol wrote, "Despite the challenges associated with developing and rolling out such an ambitious system across the DOE complex, the ePMA system has performed beyond my expectations. The Berkeley Site Office has found ePMA to be very valuable by expediting our review of R&D proposals and by providing real-time tracking information on a proposal's status and location. It has also increased communications between the site office and the HQ program offices, and between the site office and our laboratory counterparts. The ePMA Project Team successfully addressed a need in the DOE complex."

The following Project Team members received Certificates of Appreciation:

- Vince Dattoria, DOE, Office of Science
- Bonnie Lasky, DOE, Office of Science
- Dave Boron, DOE, Office of Energy Efficiency and Renewable Energy
- Jim Fremont, DOE, Office of Energy Efficiency and Renewable Energy
- David Henderson, DOE, Office of Scientific and Technical Information
- Cathy Dixon, Information International Associates, Office of Scientific and Technical Information
- Chuck Reece, Computer Sciences Corporation
- Steve Ducharme, Computer Sciences Corporation
- Alex Clayborne, Computer Sciences Corporation
- Jeff Voivoda, Computer Sciences Corporation
- Tom Tracy, Tom Tracy Associates

Feedback Requested!

- We want to hear from you. Help promote ePMA by telling others about the project or pointing them to the project Web site: http://epma.energy.gov.
- Suggest or submit an article for future editions of *Spotlight*.
- Tell us what you think about ePMA. We need your input to successfully enhance and support this first-of-a-kind system. Contact Jim Fremont, ePMA Communication and Outreach Manager, at james.fremont@ee.doe.gov

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